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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR-19-81

PROCUREMENT SECTION
CURRENT SERIAL RECORDS

WASHINGTON, May 13--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following recent developments in world agriculture and trade:

GRAIN AND FEED

The EUROPEAN COMMUNITY'S (EC) authorizations of grain exports have increased in recent weeks as it attempts to remove the accrued surplus from the domestic market and from overfilling storage facilities needed for the upcoming harvest. Despite some heavy snow in the United Kingdom, cool, wet weather in northern Europe and a period of drought in northern Italy, the 1981 EC wheat crop appears in excellent condition at this time and is likely to reach a level similar to the 1980 record crop of 51.6 million tons.

The recently stepped-up pace of authorizations, which are running ahead of last year, represents EC efforts to attain its 1980/81 export estimate of some 19 million tons, about 4 million above the previous 1979/80 high of almost 15 million tons.

EC trading sources report that the tender season for the new crop (normally opened in September but begun last July due to the record 1980 crop), may open as early as June, and tenders could be held twice weekly rather than the traditional weekly pace. These indications point to another year of sizable EC grain exports in the 1981/82 season.

	1981 export authorizations		1980 export authorizations
	as of April 23	as of March 19	as of April 24
Wheat	5.4	4.7	4.2
Barley	<u>2.5</u>	<u>2.4</u>	<u>1.7</u>
Sub-total	7.9	7.1	5.9
From Intervention stocks:			
Wheat	1.3	.7	--
Barley	<u>.6</u>	<u>.2</u>	<u>--</u>
Total	9.8	8.0	5.9
		-more-	

MARY FRANCES CHUGG, Editor. Tel: (202) 447-3370, 447-2381. Weather and Crop Summary prepared by the Joint Agricultural Weather Facility of USDA and NOAA. Tel: (202) 447-8760, 447-7917. Additional copies may be obtained from the FAS Information Services Staff, Room 5918-South, Washington, D.C. 20250. Tel: 447-7937.

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MAY 24 1981

DAIRY, LIVESTOCK AND POULTRY

In YUGOSLAVIA hog numbers as of January 1981 increased about 5 percent above the level of January 1980, and the number of total cattle was up about 1 percent from the year-earlier level. This inventory buildup reflects higher producer prices during 1980 and improved feed supplies, especially corn. Also, the government has made it easier to import beef as well as protein concentrates for livestock feeding, including oilseed, meat and fish meals. However, Yugoslavia's imports of these commodities may be limited by shortages of foreign currency.

OILSEEDS AND PRODUCTS

SOVIET imports of oilseeds and oils and fats are expected to be substantial in 1981 as domestic vegetable oil output from indigenous oil bearing materials this year is down by roughly 250,000 tons, seasonally adjusted basis; Soviet animal fat availabilities in 1981 are forecast to drop by roughly 125,00 tons; and population growth, projected at about 0.9 percent, would boost Soviet oil and fat requirements by over 50,000 tons.

If the USSR maintains per capita consumption and stocks are unchanged from a year ago, aggregate imports would exceed 1.4 million tons--more than 400,000 tons above the 1980 volume. Adding in a normal gain for maintaining the upward trend in per capita usage would require roughly an additional 100,000 tons. The combined volume of oilseeds, oils and fats reported to have been exported to the Soviet Union from all sources in 1980 was in the magnitude of 1 million tons, oil basis. If correct, the current 200,000-ton Soviet soybean oil import estimate could be substantially exceeded.

INDIA announced a new vegetable oil import policy, effective April 1, for all imports of edible and non-edible vegetable oils. All imports, whether for edible or non-edible use, will be handled by the State Trading Corporation of India (STC). The new policy is essentially unchanged from last year except that private traders are prohibited from importing coconut, palm and cottonseed oils. Reportedly, some private traders were officially importing these oils for industrial use, but later refining and selling them for human consumption.

TOBACCO

In the UNITED KINGDOM, the total weight of tobacco products consumed in 1980 fell 1.7 percent from the previous year. Cigarettes, which account for 88 percent of total tobacco consumption, decreased 1.4 percent to 97.2 million kilograms or 121.5 billion pieces. However, filter-tipped and king-sized cigarettes both increased their share of total sales.

Cigar and pipe tobacco consumption also fell in 1980. Cigar sales were down 2.5 percent in number to 1.61 billion pieces and 6.5 percent in weight to 2.9 million kilograms. Pipe tobacco sales fell 4.8 percent to 4.0 million kilograms.

In 1980, the government imposed a 5-pence price increase which was

small, compared with the recently announced increase of 14-pence per pack. As a result, tobacco consumption is likely to fall again this year. Cigarette sales were off an estimated 15 percent after the mid-March price increase, but some observers believe the most recent price hike may have been the straw that broke the smoking habit for many smokers who had been contemplating quitting for health reasons. A further increase of 2-to-3-pence per pack of cigarettes may be proposed later this year.

COTTON

In CHINA the State Statistical Bureau reports final 1980 cotton production at 12.4 million bales. This report realizes the most optimistic estimates made during the season and exceeds USDA's April estimate by 300,000 bales. Thus, 1980 cotton production in China increased a remarkable 23 percent from the successful 1979 crop and early indications point to further increases next year.

As a compliment to expanding production, China's cotton cloth-producing textile plants added 761,000 new spindles in 1980. Further success by the cotton system is indicated by the government's willingness to condone profit sharing by efficient plants. In particular, Shanghai has returned 30 percent of its retained profits to workers as bonuses.

HORTICULTURAL AND TROPICAL PRODUCTS

In SOUTH AFRICA, export availabilities from the 1981 citrus crop are expected to be slightly above last year's, according to reports from the U.S. agricultural attache in Pretoria. The total citrus crop for South Africa and Swaziland is forecast at 722,000 tons, up 1 percent over last season and should include 569,000 tons of oranges, 111,000 tons of grapefruit and 43,000 tons of lemons. Given favorable markets, exports are likely to reach 370,000 tons of oranges, up 2 percent; 82,000 tons of grapefruit, up 3 percent; and 29,000 tons of lemons, up 14 percent. South Africa's main export season is during the Northern Hemisphere summer.

In FRANCE, unseasonably cold weather on April 23 caused some damage to walnut blooms in the Perigueux area in the southwest region. Trade sources indicate a potential 10-percent loss in this area which accounts for about two-thirds of total walnut production. No significant frost damage in the Grenoble area has been reported.

In SPAIN a local cooperative in the northeastern area at Las Garrigas, Lerida, has recently put on-stream a modern almond-shelling plant capable of processing 80 percent of the Lerida crop. The plant has a daily shelling capacity of 24 tons of almonds (in-shell basis).

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AUSTRALIA'S 1981 dried vine fruit output currently is estimated at 60,100 tons, compared with 97,900 tons in 1980. Heavy rains during the second week in February reduced the sultana crop to an estimated 51,500 tons, 39 percent below 1980. Lexia raisin production, estimated at 4,620 tons, is down about 21 percent from the 1980 level, and currant output at about 3,950 tons has dropped 39 percent.

A carryover of approximately 6,800 tons of sultanas from the large 1980 crop could raise 1981 sultana exports to 40,000 tons. Preliminary export allocations of the 1981 crop are as follows in tons.

	<u>Sultana</u>	<u>Lexia</u>
Canada	14,500	200
New Zealand	4,500	600
Japan	2,000	500
Continental Europe	8,640	100
United Kingdom and Ireland	5,640	1,000
Other	<u>2,000</u>	<u>100</u>
Total	37,280	2,500

Production estimates for 1981 dried tree fruits are: prunes 2,600 tons, apricots 1,600 tons, peaches 130 tons and pears 160 tons. Australia imports small quantities of dried apricots and prunes, with the United States as the principal supplier.

In KENYA, sisal production in 1980 totaled 47,500 tons, 30 percent above the level registered in 1979 and the highest since 1975. The increased output was due primarily to the overcutting of fiber brought about by higher prices during most of 1980. Prices started trending upward in March 1979 and peaked at US \$860 per ton (for ungraded fiber) in September 1979. These prices continued through August 1980, but gradually declined to between US \$650 to \$690 per ton during September - December.

Reportedly, Kenya's sisal industry is still troubled with finding cutters because of competition with the sugar industry. However, the situation was not as acute in 1980 as during 1971. Sisal output during 1981 is forecast to be down to about 32,000 tons, due in part to prevailing drought conditions, but mostly because of the heavy cutting during 1980.

The 36th General Assembly of the COCOA PRODUCERS ALLIANCE met in Abidjan, Ivory Coast, April 27 - 30, but the meeting ended without members reaching a common position on the ratification of the new International Cocoa Agreement (ICCA). The group also rejected the Ivory Coast's plan for a common marketing policy, but did agree that each member would be at liberty to decide its degree of adherence to the new ICCA.

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Current members of the Alliance are the Ivory Coast, Brazil, Ghana, Nigeria, Cameroon, Ecuador, Togo, Gabon, Sao Tome and Principe, Trinidad and Tobago, Mexico, and Colombia. Together, these countries account for nearly 90 percent of world cocoa production. Five members of the Alliance--Ivory Coast, Togo, Gabon, Sao Tome and Principe and Trinidad and Tobago--have not signed the new ICCA as yet.

NEW RELEASES OF FOREIGN AGRICULTURE CIRCULARS

U.S. Exports of Prepared and Other Feeds Approached \$1 Billion in 1979/80, FG 12-81

Grain Exports by Selected Exporters. FG 16-81

1981 Winter Grain Conditions in the Northern Hemisphere Outside the United States, FG 17-81

Monthly Data on Meat Imports--March 1981, FLM MT 7-81

U.S. Exports of Livestock and Livestock Products Lead Imports in February, FLM MT 8-81

Dairy Exports Rise in 1980 Led by Nonfat Dry Milk; Volume of Imports Declines, FD 2-81

March Cotton Exports Up, FC 10-81

Mexican Strawberry Production Continues To Decline, FBER 1-81

U.S. Trade in Essential Oils Continues To Expand, FTEA 3-81

Update on Brazilian Citrus, FCF 3-81

U.S. Seed Exports; Marketing Year Through March and Comparisons With Previous Year, FFVS 5-81

NOTE: Calendar of FAS CIRCULAR RELEASE DATES FOR 1981 now available

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INTERNATIONAL WEATHER AND CROP SUMMARY, May 4-10

EUROPE--Warmer and drier weather moved into northern parts of the region, substantially improving growing conditions. Above-normal precipitation covered major portions of central and southern countries. France in particular received abundant rainfall across nearly the entire country, maintaining good growing conditions. Even southern Spain had continued rainfall, which improved the outlook for spring-sown crops. No countries were short of moisture for current crop needs.

USSR--Temperatures increased substantially over the winter grain belt, allowing crops to develop more normally. However, rainfall increased again over the southwestern three-fourths of the belt, causing more delays in fieldwork. Dry weather in the Chernozem Region and Volga Valley permitted stepped-up fieldwork. In the New Lands, abundant rains fell early in the week across southern crop areas, but totals over much of the east were disappointing. Spring grain planting prospects have dimmed somewhat in the east recently. Warmer-than-normal weather has dried out surface soils while rainfall has stayed light. In the western portion of the New Lands, planting prospects remain good. Cotton-growing areas in southern Uzbekistan and eastern Turkmenistan had another wet week. Rainfall amounts were generally lighter than the preceding week, but some of the showers may have caused additional localized damage to newly planted cotton.

EASTERN ASIA--In China, light rainfall of 5 to 10 mm eased dryness in parts of Shandong and Hebei. However, winter grains should now be in the heading stage of development, and additional moisture is needed on rainfed fields to assure normal yields. Soil moisture in more southerly winter grain areas remained adequate despite drier weather during the week. South of the Yangtze River, the rainy weather shifted northward out of the hills, but amounts stayed mostly below normal. The danger of flooding seems to have eased, at least for the time being. In South Korea, somewhat below-normal rainfall over most crop areas kept conditions a little dry for rice growth, necessitating careful attention to irrigation.

SOUTH ASIA--Pre-monsoon showers covered much of India and Bangladesh. Rainfall accumulation in Bangladesh is now running near normal, but the showers in India are earlier than expected. Some wet weather in Kashmir and northern Pakistan may have disrupted late harvesting of winter grains.

NORTHWESTERN AFRICA--Fair weather early in the week allowed fields of maturing winter grain in Morocco and Algeria to dry out. However, a front moving in over the weekend brought unfavorable damp weather to northern Morocco. Yield losses are not expected unless the dampness persists. Tunisia had relatively good harvest weather.

SOUTH AMERICA--Heavy shower activity was concentrated in Uruguay and adjacent areas of Argentina and Brazil. Weekly rainfall averaged 50 to 75 mm in this region with locally heavier amounts of 100 to 150 mm in northeastern Uruguay and extreme southwestern Rio Grande do Sul. Harvest delays due to wet fields and some local crop damage from excessive rainfall can be expected in these areas. Rainfall amounts decreased from east to west in Argentina across the major crop producing regions of Buenos Aires, Entre Rios, Santa Fe, Cordoba and La Pampa. The major soybean harvest had just begun during early May in Argentina while corn and sorghum harvests were far advanced. In Brazil's south-central crop area, mostly dry weather aided corn and soybean harvests. The moisture situation for winter wheat sowing, which normally begins in May, is generally favorable in most areas of Brazil and Argentina.

SOUTHEAST ASIA--Over much of Thailand significant rainfall occurred, averaging 50 to 100 mm from the Central Plains, north of Bangkok, and northward. Light rainfall of less than 10 mm fell in both the extreme west and northeastern portions of the country. Early-planted corn and rice should have a good start due to early season rainfall which began in April. In addition, reservoir levels in central and northern Thailand should benefit from this favorable onset of the wet season.

CANADA--Significant weekly rainfall of 25 to 85 mm occurred in the western Prairies as a storm system pushed southeastward from the Pacific during midweek. Although the wet weather delayed fieldwork, it also improved topsoil moisture conditions in preparation for wheat sowing. Spring wheat and durum plantings were about 10 to 15 percent complete in Alberta. Rainfall was much less in central and eastern Prairies. Weekly amounts were generally less than 10 mm in most of Saskatchewan and Manitoba. Spring seeding was progressing well in Saskatchewan although cold weather with minimum temperatures falling below freezing moved in over the weekend.

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AUSTRALIA--Beneficial moisture fell only in southeastern Australia where weekly totals ranged from 10 to 40 mm in southern New South Wales, Victoria and extreme southeastern South Australia. Elsewhere, continued dry weather prevailed. Ample time is still available for wheat sowing, usually May and June; however, significant moisture will be needed especially in northern New South Wales and West Australia. Soil moisture reserves are low in these areas and rainfall will be necessary to provide favorable conditions for germination and emergence.

MEXICO--Light showers dotted the east, but rainfall was too small to significantly improve soil moisture or interfere with field activities. Sunny, dry weather with hot afternoons kept most crops progressing seasonably well over the main agricultural areas. Heavy rains over El Salvador and southern Nicaragua implies an early start of the rainy season which usually progresses northwestward into Mexico in a few weeks.

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Rotterdam Prices and E.C. Import Levies:

Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	May 12, 1981	Change from previous week	A year ago
	\$ per m. ton	\$ per bu.	\$ per m. ton
Wheat			
Canadian No. 1 CWRS-12.5%.....	1/	1/	1/
U.S. No. 2 DNS/NS: 14%.....	208.00	5.66	194.00
U.S. No. 2 DHW/HW: 13.5%.....	207.00	5.64	1/
U.S. No. 2 S.R.W.....	180.00	4.90	188.00
U.S. No. 3 H.A.D.....	230.00	6.26	228.00
Canadian No. 1 A: Durum.....	1/	1/	248.50
Feed grains:			
U.S. No. 3 Yellow Corn.....	159.75	4.06	135.00
U.S. No. 2 Sorghum 2/.....	164.00	4.17	1/
Feed Barley 3/.....	157.25	3.42	137.00
Soybeans:			
U.S. No. 2 Yellow.....	307.50	8.37	255.50
Argentine 4/.....	301.00	8.19	251.20
U.S. 44% Soybean Meal (M.T.)..	271.00	--	222.00
EC Import Levies			
Wheat 6/.....	74.82	2.04	116.18
Barley.....	66.42	1.45	119.20
Corn.....	68.74	1.75	129.55
Sorghum.....	69.00	1.75	118.57

1/ Not available.

2/ Optional delivery: U.S. or Argentine Granifero Sorghum.

3/ Optional delivery: U.S. or Canadian Feed Barley

4/ Optional delivery: Brazil yellow.

5/ Dollars per metric ton.

6/ Durum has a special levy.

Note: Basis June delivery.

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